

# Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:

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SECRETARY OF THE SENATE  
PUBLIC RECORDS

2019 OCT -8 PM 3:13

**Post-Travel Filing Instructions:** Complete this form within 30 days of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☐ The original *Employee Pre-Travel Authorization* (Form RE-1), AND  
☐ A copy of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

The Atlantic Council

Private Sponsor(s) (list all):

October 2nd- 3rd

Travel date(s):

Name of accompanying family member (if any):

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

**Expenses for Employee:**

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input checked="" type="checkbox"/> Good Faith Estimate	Total: \$445 \$295 Round-Trip Airfare	\$96/ night Total: \$192	\$75	
<input type="checkbox"/> Actual Amount	\$150 Van Transport			

**Expenses for Accompanying Spouse or Dependent Child (if applicable):**

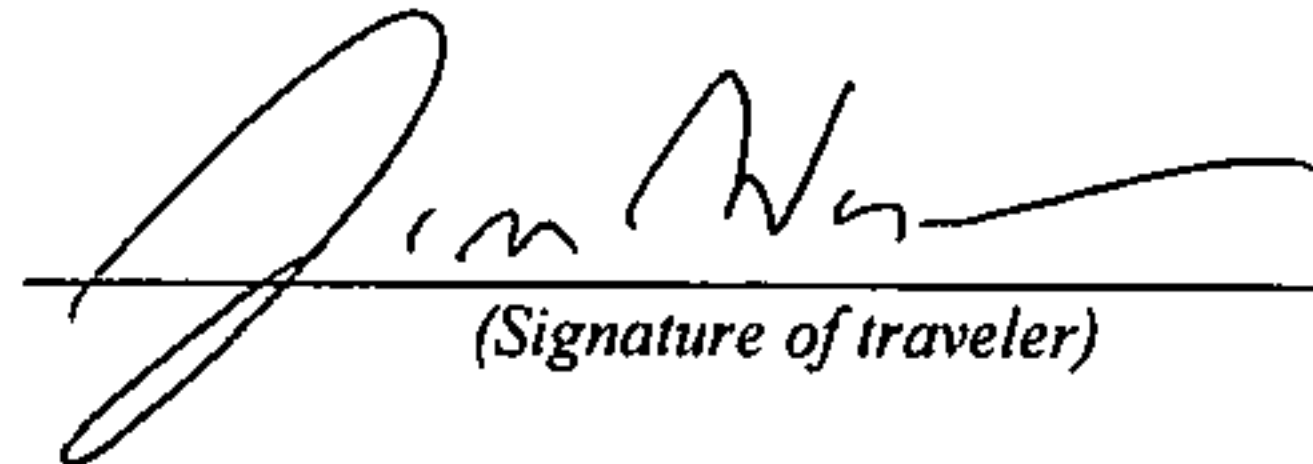
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): I attended meetings at CU-ICAR, BMW, and Proterra as well as two dinners, where the topic of vehicle electrification was discussed at length. The context of these meetings and discussion was how Upstate South Carolina was leading in this industry. Additionally, the meetings served as a way to discuss how federal policies impact, both positively and negatively, the South Carolina economy.

10/8/19  
(Date)

Jim Warren

(Printed name of traveler)

  
(Signature of traveler)**TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:**

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

10/8/19  
(Date)

(Signature of Supervising Senator/Officer)

## PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): The Atlantic Council
2. Description of the trip: Site visits and briefings with key stakeholders within the electric mobility and advanced transportation fields based in South Carolina
3. Dates of travel: October 2-4, 2019
4. Place of travel: Greenville-Spartanburg, South Carolina
5. Name and title of Senate invitees: See Addendum #2
6. I *certify* that the trip fits one of the following categories:
  - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
  - OR**
  - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
  - AND**
  - ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
  - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
  - AND**
  - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

- OR -

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

- OR -

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

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11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

Please See Addendum #1

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13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

Please See Addendum #1

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14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

Over the past decade, the Atlantic Council has sponsored various trips across the world for relevant

policymakers and congressional staff. For example, in April 2019 and October 2018, the Atlantic Council

sponsored congressional delegations to the United Arab Emirates focused on clean energy.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

Please see Addendum #1

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate	Total: \$360	\$96/night	\$75	None
<input type="checkbox"/> Actual Amounts	\$210 One-Way Airfare \$150 Van Transport	Total: \$192		

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip includes an event that is organized specifically with regard to congressional participation.

18. Reason for selecting the location of the event or trip

The Greenville-Spartanburg area (SC) is a central hub for the automotive manufacturing sector and for advanced transportation innovations, and has attracted significant domestic and international investment.

19. Name and location of hotel or other lodging facility:

Embassy Suites by Hilton, Greenville Golf Resort

670 Verdae Boulevard, Greenville, SC 29607

20. Reason(s) for selecting hotel or other lodging facility:

The hotel offers a competitive rate in line with per diem lodging rates and is located near site venues and restaurants.



21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

**Meal estimates are below official M&I rate. Lodging estimates are equal to per diem rates.**

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

**One-way economy tickets from Washington, DC to Greenville, South Carolina.**

**Fifteen-passenger van for on-site transportation.**

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

**Signature of Travel Sponsor:**

Julie Varghese

Name and Title: Julie Varghese, Chief Administrative Officer

Name of Organization: The Atlantic Council

**Address:** 1030 15th Street NW, 12th Floor, Washington, DC 20005

Telephone Number: 202.778.4952

Fax Number: 202.463.7241

F-mail Address: [JVarghese@AtlantiCouncil.org](mailto:JVarghese@AtlantiCouncil.org)

**Addendum:**

**12.** The Atlantic Council is the sole organizer and implementer of this trip, and is solely responsible for the agenda, the selection of sites and guest speakers, and the execution of the trip itself. The Atlantic Council will pay for the traveler's airfare, hotel accommodations, meals, and transportation, pursuant to relevant Ethics guidelines. The funds used to cover these expenses derive from grant support provided by the MacArthur Foundation to the Atlantic Council Global Energy Center for the purpose of informing and educating key stakeholder groups on the latest trends in clean energy, clean transport, and climate change. The MacArthur Foundation does not include any specific provision for any specific Congressional staff delegations as part of this broad support, and the decision to organize this staff delegation is at the discretion of the Atlantic Council as part of its work. The MacArthur Foundation provides only broad funds for the Atlantic Council's research and education work related to clean energy, clean transport, and climate, and has played no role in the organization or execution of the trip.

**13.** The Atlantic Council is a registered 501(c)(3) nonprofit organization and promotes constructive US leadership and engagement in international affairs based on the central role of the Atlantic community in meeting current international challenges. The Atlantic Council's Global Energy Center specifically promotes energy security by working alongside government, industry, civil society, and public stakeholders to devise pragmatic solutions to the geopolitical, sustainability, and economic challenges of the changing global energy landscape.

Consistent with its mission, the Atlantic Council wishes to provide an educational tour and briefings for congressional staff that highlight leadership in electric mobility and clean transport technologies at key institutions (both academic and private sector) across the Greenville-Spartanburg area, with a focus on how this leadership contributes to energy security, economic competitiveness, and local development. For example, Proterra, the largest electric bus manufacturer in the United States, is based in the target geographic area, where it provides it supports the local economy and labor force and competes actively with other international electric bus manufacturers for market share in this rapidly growing industry. The trip will provide a unique opportunity to see this work first-hand, and hear from leaders about the role of constructive state-federal engagement in developing commercially viable, international competitive clean energy technologies.

**15.** Through its diverse networks, the Atlantic Council builds broad constituencies to support constructive US leadership and policies. The Global Energy Center, along with the other ten program and centers within the Atlantic Council, publishes analyses, convenes conferences among current and/or future leaders, and contributes to the public debate in order to integrate the views of relevant individuals from a variety of backgrounds.



# GLOBAL ENERGY CENTER

## Agenda:

## South Carolina Advanced Energy & Transport Staff Delegation Trip, October 2-4, 2019

**Wednesday, October 2, 2019**

**1:44 p.m.**      **Depart for Greenville**  
**Location:** Washington National Airport (DCA)  
**Flight number:** AA 5473  
**Airline:** American Airlines

**3:30 p.m. Arrive in Greenville**

**4:15 p.m.**                      **Drive to Hotel**  
**Transit Time: 25 minutes**  
**Transportation: Van**

**4:40 p.m.**      **Hotel Check-in and Settle in**  
**Hotel:** Embassy Suites by Hilton Greenville Golf Resort  
**Address:** 670 Verdae Boulevard, Greenville, South Carolina 29607

**6:00 p.m. Drive Downtown for Dinner**  
**Transit Time: 20 Minutes**  
**Transportation: Van**

**6:30 p.m. Welcome Dinner and Briefings**  
**Venue:** The Nose Dive  
**Address:** 116 S Main St, Greenville, SC 29601

**Briefers:**

**Mr. David Livingston, Deputy Director for Climate & Advanced Energy, Atlantic Council**

Mr. Vincenc Pearson, Corporate Counsel, DAA Draexlmaier Automotive of America LLC

Invited Guests:

**Mr. Sam Moses, Partner, Parker Poe**

**Mr. David Lewis, President and Owner, Context Design Group**

**Mr. Steve Cooper, Managing Partner, Rödl & Partner USA**

**Format: Dinner briefing and discussion around the table**

Staffers will receive an overview of South Carolina and its economy, serving to create a foundational structure of the broader dynamics underpinning many of the organizations and themes that will be discussed on the trip. A particular focus of the discussion will be the relative density of activity related to advanced

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## Drive to Hotel

**8:30 - 9:30 a.m.**

**9:45 a.m.**

**10:00 - 11:30 a.m.**

**Briefers:**

**Format:** Conference room briefing and guided tour

**11:30 a.m.**

**12:00 - 1:30 p.m.**

**Briefers:**

**Format:** Lunch briefing and discussion around the table





**Depart for Hotel**  
**Transit time: 10 mins**  
**Transportation: Van**

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**Transit time: 10 mins**  
**Transportation: Van**

**Depart for Dinner Venue**  
**Transit time: 20 mins**  
**Transportation: Van**

**Transit time:** 10 mins

**Transportation: Van**

**Depart for Dinner Venue**  
**Transit time:** 20 mins  
**Transportation:** Van

**Dinner Briefings with Local Business & Government Leaders**  
**Venue:** Larkins on the River  
**Address:** 318 S Main St, Greenville, SC 29601

**Transit time: 20 mins**

**Transportation:** Van

**Briefers:**  
Rep. William Timmons, US Representative, 4th District, South Carolina  
Mr. James Keel, Director of Public Transportation, Greenlink (Greenville  
Transit Authority)  
Mr. Michael Rowand, Director, Technology Development, Duke Energy

**Venue:** Larkins on the River

**Address:** 318 S Main St, Greenville, SC 29601

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Mr. Michael Rowand, Director, Technology Development, Duke Energy

**Mr. Kent Leacock, Senior Director, Government Relations & Public Policy,  
Proterra**

## Proterra

Staffers will synthesize their observations and experiences from the day, putting their site visits into a broader context. Staffers will also hear from key local leaders, including congressional Representative Timmons, who represents the region being visited and can provide additional insights into local economic and industry trends, as well as James Keel, the Interim Director of Greenlink, which has deployed Proterra electric buses and can provide insight into how electric transport is impacting operational, environmental, and financial dynamics of the Greenville Transit Authority.

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### Trip Concludes for Traveler

# Senate Staffers

Honorable	First Name	Last Name	Title
Ms.	Jessi	Axe	Professional Staff Member
Mr.	Garrett	Boyle	Legislative Director
Mr.	Chester	Carson	Senior Professional Staff Member
Mr.	Lane	Dickson	Professional Staff Member
Ms.	Clare	Doherty	Clerk
Ms.	Danielle	Gibbs	Upstate Regional Director
Mr.	Aaron	Goldner	Energy and Environment Counsel
Mr.	Scott	Graber	Legislative Assistant and Counsel
Ms.	Eva	Gutierrez	Legislative Correspondent
Mr.	Christopher	Hanson	Professional Staff Member
Ms.	Dabney	Hegg	Clerk
Dr.	Ariel	Marshall	Legislative Director
Mr.	Rajat	Mathur	Professional Staff Member
Ms.	Kayla	McMurry	Legislative Assistant
Ms.	Anna	Newton	Legislative Correspondent
Ms.	Angela	Omer	Upstate Regional Director
Mr.	Tyler	Owens	Clerk
Mr.	Bryan	Petit	Senior Professional Staff Member
Mr.	Nathan	Robinson	Professional Staff Member
Mr.	Rishi	Sahgal	Legislative Assistant
Mr.	Meyer	Seligman	Professional Staff Member
Mr.	Rory	Stanley	Professional Staff Member
Ms.	Zahava	Urecki	Professional Staff Member
Ms.	Hannah	Vogel	Legislative Aide
Mr.	Jim	Warren	Deputy Legislative Assistant
Mr.	Garrett	Boyle	Legislative Director
Mr.	Chester	Carson	Senior Professional Staff Member
Mr.	Lane	Dickson	Professional Staff Member
Ms.	Clare	Doherty	Clerk
Ms.	Danielle	Gibbs	Upstate Regional Director
Mr.	Aaron	Goldner	Energy and Environment Counsel
Mr.	Scott	Graber	Legislative Assistant and Counsel

Ms.	Eva	Gutierrez	Legislative Correspondent
Mr.	Christopher	Hanson	Professional Staff Member
Ms.	Dabney	Hegg	Clerk
Dr.	Ariel	Marshall	Legislative Director
Mr.	Rajat	Mathur	Professional Staff Member
Ms.	Kayla	McMurry	Legislative Assistant
Ms.	Anna	Newton	Legislative Correspondent
Ms.	Angela	Omer	Upstate Regional Director
Mr.	Tyler	Owens	Clerk
Mr.	Bryan	Petit	Senior Professional Staff Member
Mr.	Nathan	Robinson	Professional Staff Member
Mr.	Rishi	Sahgal	Legislative Assistant
Mr.	Meyer	Seligman	Professional Staff Member
Mr.	Rory	Stanley	Professional Staff Member
Ms.	Zahava	Urecki	Professional Staff Member
Ms.	Hannah	Vogel	Legislative Aide
Mr.	Jim	Warren	Deputy Legislative Assistant



Affiliation									
Senate Committee on Appropriations: Subcommittee THUD									
Office of Senator Murkowski									
Senate Committee on Energy and Natural Resources									
Senate Committee on Energy and Natural Resources									
Senate Committee on Appropriations; Subcommittee THUD									
Office of Senator Scott, Upstate Office									
Office of Senator Whitehouse									
Office of Senator Graham									
Office of Senator Shaheen									
Senate Committee on Appropriations: Energy and Water Development									
Senate Committee on Appropriations; Subcommittee THUD									
Office of Senator Shaheen									
Senate Committee on Appropriations: Subcommittee THUD									
Office of Senator Collins									
Office of Senator Alexander									
Office of Senator Graham, Upstate Office									
Senate Committee on Appropriations: Energy and Water Development									
Senate Committee on Energy and Natural Resources									
Senate Committee on Appropriations: Subcommittee THUD									
Office of Senator Feinstein									
Subcommittee on Energy and Water Development									
Senate Committee on Energy and Natural Resources									
Senate Committee on Energy and Natural Resources									
Office of Senator Markey									
Office of Senator Scott									
Office of Senator Murkowski									
Senate Committee on Energy and Natural Resources									
Senate Committee on Energy and Natural Resources									
Senate Committee on Appropriations; Subcommittee THUD									
Office of Senator Scott, Upstate Office									
Office of Senator Whitehouse									
Office of Senator Graham									

Office of Senator Shaheen									
Senate Committee on Appropriations: Energy and Water Development									
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Senate Committee On Appropriations; Subcommittee on Energy and Water Development									
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